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ABSTRACT

Increasingly, people need lifelong access to high quality guidance on choices relating to learning and work. Unions can plan a key role as advocates and deliverers of information, advice, and guidance. Lifelong learning and guidance assume more importance as the concept of a job for life disappears. Career guidance helps individuals explore their options, develop the confidence and knowledge to make informed choices, and learn how to make plans and put them into effect. Front-line guidance activities are probably of most direct relevance to unions. They realize the long-term value of lifelong learning and guidance initiatives to company and individuals and find their involvement increases their attractiveness to members and prospective members. Unions can play key roles in developing learning and guidance provision: providing the necessary atmosphere of trust and credibility; reaching out and communicating; identifying employees' learning needs and feeding them back to management; acting as advocates; and working with management to develop provision. Depending on their skills, union representatives can be involved in such roles as signposting, brokerage, and front-line guidance. Unions may help identify opportunities for companies to extend guidance to the local community. Help may be available to unions through partnerships and networks; training is available. A model has been developed that summarizes the key features most commonly shared by companies with a culture of learning and guidance. (YLB)

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NICEC TUC

Briefing

ED 419 173

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

Trade Unions and Lifelong Guidance

Increasingly people need lifelong access to high-quality guidance on choices relating to their learning and work. Many employees look to their workplace for their first line of support. Unions can play a key role both as *advocates* and as *deliverers* of information, advice and guidance.

This Briefing:

- outlines why lifelong learning and guidance are assuming so much importance;
- shows how guidance relates to lifelong learning;
- defines what is meant by guidance;
- describes why lifelong access to guidance is important for Unions;
- considers the relevance of such issues in small and medium-sized enterprises;
- identifies the roles which exist for Unions in making guidance services more widely available to employees and members;
- indicates the help which may be available to Unions through partnerships and networks;
- provides individual examples, and an overall model, of good practice.

The Briefing has been written by Geoff Ford (NICEC Fellow) and Tony Watts (NICEC Director) in association with the Trades Union Congress, supported by funding from the Department for Education and Employment.

TUC

The Trades Union Congress has over 70 member trade unions, representing nearly seven million people from all walks of life. It is Britain's largest voluntary organisation. It campaigns on concerns in the world of work, and builds links with all political parties, business and the community.

NICEC

The National Institute for Careers Education and Counselling is a network organisation initiated and supported by CRAC. It conducts applied research and development work related to guidance in educational institutions and in work and community settings. Its aim is to develop theory, inform policy and enhance practice through staff development, organisation development, curriculum development, consultancy and research.

CRAC

The Careers Research and Advisory Centre is a registered educational charity and independent development agency founded in 1964. Its education and training programmes, publications and sponsored projects provide links between the worlds of education and employment. CRAC has sponsored NICEC since 1975.

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WHY?

Current changes in the structure of work have immense human implications. The concept of a 'job for life' is disappearing. Manual and more routine jobs in particular are declining. Employers are increasingly looking for evidence of a wider range of abilities, including the ability to learn new skills. For the vast majority, relative security in employment depends on employability; which in its turn depends on the level and range of an individual's skills.

The opportunities for adults to access lifelong learning vary according to:

- level and type of employment;
- the policies of individual employers.

There is evidence that:

- one-third of all employees receive no training from their current employer;
- employees of professional and managerial status are the most likely to receive training;
- employees working part-time or on temporary contracts, or employed by small and medium-sized enterprises (SMEs), often have little access to training;
- training is often limited to health and safety, and product knowledge.

If individuals are to make the best use of lifelong learning, they need to be able to relate the opportunities to their own individual needs and circumstances. It is therefore necessary that adults also have ready access to high-quality information, advice and guidance.

> For many adults their employer is their first port of call for advice and guidance ... Since security of employment is dependent on the maintenance of skills, Unions can aid their members in bargaining for employees' access to guidance.' *(Kim Howells MP, Parliamentary Under-Secretary of State for Lifelong Learning, DfEE)*
>
> 'If Britain is to have a world class workforce, then every workplace must become a learning organisation and every worker a learner.' *(John Monks, TUC General Secretary)*

WHAT?

Career guidance helps individuals to:

- explore their learning, work and career options, taking full account of their personal circumstances;
- develop the confidence and knowledge to make informed choices about the options available;
- learn how to go about taking decisions and making plans;
- learn how to put their plans into effect.

In-depth guidance is a specialist activity, necessitating detailed training in counselling, and in assessment techniques such as psychometric testing.

However, some of the most important activities of guidance take place at the 'front-line', and it is these which are likely to be of most direct relevance to Unions. Front-line guidance activities include:

- *providing accurate information*, e.g. about opportunities, providers, and how to access more in-depth help;
- *signposting*, i.e. re-directing individuals to appropriate levels of advice and guidance within or outside the organisation;
- *providing advice*, i.e. helping individuals to interpret information and decide on the most suitable course of action;
- *supporting and enabling*, e.g. in gaining the confidence to start and carry through a course of learning;
- *advocating*, i.e. negotiating directly with institutions or agencies on behalf of individuals or groups;
- *feeding back*, i.e. gathering and collating information on unmet, or inappropriately met, learning needs and encouraging providers to respond to these.

> The National Advisory Council for Careers and Educational Guidance has recognised the important role Unions can play in guidance provision. National quality standards are being developed for guidance services delivered by Unions, professional associations, and organisations whose main business interest is not guidance.

UNION INTERESTS

Some of the most successful lifelong-learning and guidance initiatives have resulted from emergency measures taken jointly by Unions and management to help employees facing major restructuring and redundancy. Subsequently, both sides have realised the long-term value to company and individuals, and have worked together to integrate lifelong learning and guidance permanently into the company culture.

Union representatives with strong local community networks are particularly well placed to act on behalf of their members, in reacting to emergencies but also in identifying opportunities to meet longer-term needs.

The main purpose of Unions is to represent and take forward the interests of their members. More branches are identifying ready access to high-quality learning and guidance provision as central to their members' security and quality of life. Some unions have included the introduction of lifelong learning and guidance policies as a key item in a package of measures which they have negotiated with management. Others have preferred to set lifelong learning and guidance apart for separate negotiation.

A number of Unions are also finding that their work in developing lifelong learning and guidance provision is increasing their attractiveness to members and prospective members alike.

The TUC works in partnership with many TECs to increase learning opportunities for employees through locally-targeted Bargaining for Skills projects. When employees at BICC Cables, Blackley, faced restructuring and redundancy after BT halved its order, Management and Unions reached an agreement to implement a lifelong learning strategy and upskill the workforce; they invited assistance from the North West Bargaining for Skills project. Significant outcomes included: employee access to communication skills training a learning centre; and company-funded self-study courses. Shop stewards have been trained as National Vocational Qualification (NVQ) assessors. The company has achieved Investors in People status, and is now sole supplier of cables to BT.

Much of the existing good practice has been initiated by larger employers. SMEs can encounter particular difficulties in providing lifelong learning and guidance, including pressure to concentrate their more limited resources on meeting immediate production and service requirements. However, the increasingly competitive economic environment is making the ability of SMEs to participate actively in lifelong learning an economic priority.

A number of TECs and Bargaining for Skills projects are developing the necessary supportive frameworks for SMEs, including support for the creation of SME-Union partnership activities involving groups of companies. The Northern TUC and North East TECs Lifelong Development Project has actively involved representatives from SMEs in its conferences, briefing sessions, training events and courses, including away-days and residentials.

ROLES

Unions are particularly well positioned to see the inter-relationships between lifelong learning and guidance requirements because of their closeness to members and employees, and their more intimate and holistic knowledge of individual needs and circumstances. The special relationship between Unions and their members can help Unions to play a number of key roles in developing learning and guidance provision. These include:

- providing the necessary atmosphere of *trust and credibility*, so that employees can understand that engagement in lifelong learning is in their own individual interests;
- *reaching out* to individuals and communities where there may be personal and cultural barriers inhibiting entry into learning, and *communicating* the value of involvement in terms which may be more readily understood and accepted;
- *identifying* the learning needs of employees, including *basic-skill learning requirements* (e.g. literacy and numeracy), and *feeding back* these requirements to management and other relevant bodies (possibly supported by *surveys*);
- acting as *advocates* of lifelong learning and guidance, and *negotiating* with management for appropriate provision;
- working in partnership with management to:
  - *develop* lifelong learning and guidance provision;
  - help in *assuring and improving its quality*;
- providing employees with *individual support*, including help in overcoming initial reluctance to learn and subsequent learning problems caused by lack of confidence;
- providing *assurance that guidance is confidential*, whether delivered internally or through externally-contracted services (provided unions have first assured themselves that this is the case);
- utilising relevant *labour market information and learning resources* available to branches through their Union HQ and the TUC;
- helping all parties, including management and employees, to *appreciate the transferable relationship between vocational learning and more broadly-based learning for personal development*.

The TGWU has played a major role in implementing lifelong learning and guidance policies at Premier Biscuits, Merseyside, assisted by the NW Bargaining for Skills Project. The Union conducted a survey of employee learning needs, and used the information in negotiations with management. The survey showed a pent-up demand for broader-based training, including basic skills and IT, as well as for vocational qualifications. The survey has helped the Union to negotiate a 'twin-track' learning strategy of NVQ training and broader-based education through a work-based and college-run learning centre. Guidance is provided by the college, and by trained Union representatives and employee volunteers.

PROVIDING GUIDANCE

Union representatives will see considerable overlaps between their own activities, and the activities involved in effective front-line delivery of lifelong guidance. However, there are also important areas of difference – for example, in terms of subject content and appropriate methodology. In particular, *advising* is an activity requiring specialist skills and experience.

For many Union representatives, their involvement may be predominantly a signposting and "brokerage" role, based on their knowledge of learning and guidance provision in or outside the workplace.

Where representatives play a more extensive role in the delivery of front-line guidance, this should be on the basis of suitability, interest, and willingness to volunteer and undertake the necessary training.

Suitably trained volunteer employee advisers may also have a role to play in the shop-floor delivery of guidance. Volunteers should be selected because they have the relevant backgrounds, including direct experience of lifelong learning. Volunteers may also play a valuable part by acting as role-models, and helping to raise the confidence of potential learners.

UNISON's Return to Learn Programme is operated jointly with the WEA, and organised in partnership with management to assist many public service employees with little educational achievement. UNISON has developed a programme to train ex-students as Voluntary Education Advisers (VEAs) to provide front-line guidance to intending and current students. Activities include individual mentoring and support, and working as tutor assistants. VEAs also act as valuable role models to new students.

The Management-Union partnership formed at Elida Faberge, Leeds, has enabled the Company to establish a well-equipped and hi-tech Learning Centre staffed by a full-time Manager professionally qualified in guidance and training. Union representatives and volunteer employees have attended a two-day training course in front-line guidance skills. Volunteer staff of all levels have been trained in training skills, and constitute Elida Fabergé's Faculty of Trainers.

Unions serving the civil, public and allied services are working together to implement the Lifelong Learning Trust to provide information, advice and guidance to members on personal and career development. The aims of the Trust include:

- working to raise levels of basic skills and motivation to learn – the Baseline Programme;
- assisting individuals to develop their own learning portfolios – the Portfolio Programme;
- encouraging individuals to review their careers, and maximise their life and learning potential – the Panorama Programme.

HELPING THE COMMUNITY

Unions may identify opportunities for companies who have developed lifelong learning opportunities to influence, and possibly extend, facilities to the wider local community. This may also apply to guidance.

Often this will happen naturally. Employees themselves are part of wider local networks, including their own families. Companies with learning centres have found that one of the most powerful stimulants for employees to re-enter learning is often to help their own children. Some companies have allowed employees' families to use the Learning Centre, and to access local information and guidance resources.

Some companies are also considering ways of extending learning and guidance facilities more widely to help other community members, including employees in smaller local companies and the unemployed.

Unions have played a lead role in implementing the Ford Employee Development and Assistance Programme. Guidance is provided by qualified adult guidance staff, in partnership with the University of East London. Ford EDAP has found that many employees are initially motivated to learn because they want to assist their own children. EDAP's Education Advisers therefore also offer guidance to employees on their children's education; and numbers of employees enrol on specific GCSE and A-level courses to enable them to assist their families. The Dagenham Learning Centre is regularly staffed on Saturdays to provide courses in key skills for employees' families.

ScottishPower Learning is a joint Management-Union venture. A network of Open Learning Centres has been developed in Scotland, Wales and England, and is available to employees, their families and members of the community. Local community links are being developed to help schools establish assisted-study programmes, and offer computer skills training to the unemployed and people running small businesses. ScottishPower Learning also works in partnership with wider local and national networks to support a range of education, training, outward bound and related programmes to assist local communities.

PARTNERSHIPS

WITH EMPLOYERS

Surveys of good practice show that the most successful company learning and guidance policies occur where Unions and employers have worked together to achieve effective Management-Union Partnerships.

Management-Union Partnerships provide the framework within which to identify areas of common interest, and establish a shared agenda. Guidance is essentially a 'bottom-up' approach which can inform, feed back into, and enrich lifelong learning strategies whose origins may be 'bottom-up', 'top-down', or both. Management-Union Partnerships make possible a continuing dialogue on the common ground uniting the two approaches.

The dialogue may also extend to include closely-related areas of policy such as staff appraisal and IiP, where the quality of the processes involved may also have implications for the success and effectiveness of lifelong learning and guidance strategies.

Management at BWI Manesty, Liverpool, wanted to introduce TWI and establish a more open relationship with Unions and employees. The Company, with the assistance of the NW Bargaining for Skills Project, developed a Management-Union Partnership approach to employee development which also embraced Total Quality Management and IiP. As a consequence, the majority of staff are achieving NVQs, the Company is funding progression courses including degrees, and employees are pressurising Unions and Management for more training and learning opportunities.

THROUGH NETWORKS

The implementation of successful lifelong learning and guidance strategies is essentially a teamwork exercise requiring the active participation of a number of partners. Surveys of good practice demonstrate the value of Unions developing strong working partnerships with other key local, regional and national players.

Unions involved in taking forward lifelong learning and guidance strategies need to draw on the external support and resources available from local networks (including time, expertise, provision, and possibly finance). Key players may include TECs, colleges of further education, community education, and local guidance providers (adult guidance services, careers services, and local guidance networks).

Representatives will also need to understand national policy initiatives (e.g. the Learning Direct helpline, Individual Learning Accounts, and the University for Industry), and appreciate new methods of communicating information (e.g. the Internet).

Local Union branches may need assistance in identifying and utilising national, regional and local provision. Nationally, the TUC and the headquarters of individual Unions are increasingly active in disseminating the necessary information to local level. Regional TUC offices and the TUC/TEC Bargaining for Skills Projects have been working together to establish active networks on behalf of local branches.

TRAINING

Many Union representatives require training in the issues and processes of lifelong guidance, appropriate to the nature and depth of their involvement. Training is most likely to be provided via local and regional networks. Providers may include:

- the TUC Regional Education Service, normally working in partnership with local colleges of further education or the Workers' Educational Association;
- individual Unions;
- locally networked provision, possibly delivered through an accredited training centre offering guidance courses (e.g. careers service or college);
- the TUC and Bargaining for Skills, which may also use a number of providers including those itemised above.

Training needs to be tailored to meet differing but complementary objectives, including:

- raising awareness of the issues and processes involved in lifelong learning and guidance, including the procedures involved in NVQ assessment and accreditation *(awareness raising is arguably the majority requirement)*;
- advocacy and negotiation specific to lifelong learning and guidance *(mainly for convenors and shop stewards)*;
- training in front-line information, advice and guidance, including an understanding of personal boundaries, when to refer, and local helping networks *(for volunteer representatives and employees)*.

Some training may be through short awareness-raising events. Other training may be accredited through Open College Networks or against relevant NVQ standards (in Training and Development, or Guidance).

The TUC Regional Education Service provides training to shop stewards and Union representatives in subject areas which include lifelong learning, key training initiatives such as NVQs and IiP, identifying training needs, and negotiating for lifelong learning. The TUC has developed a national model for a progressive and accredited course for Union representatives on lifelong learning in the workplace, which is also designed to facilitate guidance.

Sheffield Careers Service for Adults runs a number of courses in front-line guidance for local organisations. Union representatives and volunteer employees have attended courses in front-line guidance skills for co-ordinators of employee development programmes, and in order to become qualified in adult guidance (to NVQ level 3 or equivalent).

The transnational and EU Leonardo-funded Shop Steward and Education and Training Adviser (SETA) Project is developing a training programme for Union officers and representatives to enhance their awareness of educational advice and guidance, and to help them negotiate or provide front-line guidance for members. The WEA is a main partner.

A MODEL OF GOOD PRACTICE

The following model summarises the key features most commonly shared by companies with a culture of learning and guidance.

Management-Union Partnership

Management and Unions recognise:
- the role of lifelong learning in helping employees to cope effectively with change;
- the congruence between the development requirements of the employer, and of each individual employee;
- the relationships linking TQM (including IiP), lifelong learning, and guidance;
- the range of roles Union representatives can play at shopfloor level in helping to implement lifelong learning and guidance, and in influencing culture change through their closeness to individuals and groups.

Management and Unions recognise the potential for future growth which can exist in apparently negative situations (such as redundancy), and are able to turn the negative into positive opportunities for the existing and future workforce.

An initial survey is carried out to obtain feedback on employee views and requirements, and is utilised in developing subsequent learning and guidance strategies (grassroots experience indicates that an initial employee survey can increase motivation and take-up, and prevent drop-out).

A close working and ongoing partnership between Management and Unions is achieved, based on mutual openness and respect. The partnership enables Unions to:
- provide regular feedback on members' learning needs;
- act as advocates to individuals and groups of individuals;
- participate actively in policy-making groups;
- contribute to quality assurance and development.

Networking

Local Union representatives are able to draw upon well-developed local and national networks, in order to:
- identify and obtain appropriate internally and externally-based assistance and support;
- improve and extend the opportunities and services available to their members.

Lifelong learning and guidance opportunities

All employees have ready access to high-quality front-line guidance, able – as a minimum – to offer:
- accurate and up-to-date information;
- signposting and referral to appropriate sources of help including in-depth guidance;
- support in overcoming personal difficulties which inhibit learning, including problems caused by low self-esteem;
- informed advice on progression opportunities after completing a course of learning, including the 'next step'.

Management and Unions recognise, and are prepared to respond appropriately to, the diversity of learning requirements. They recognise the importance of:
- the primary need that some employees may have for basic-skills 'bridging' courses, including literacy and numeracy, before they can make further progress;
- training to increase equality of opportunity (including women, employees with few if any qualifications, older people, ethnic minorities, and people with disabilities);
- training to increase skill levels, including multi-skilling;
- providing progression opportunities, including progression to degree level;
- providing opportunities to acquire qualifications, including NVQs and Open College credits (field evidence indicates that the opportunity to acquire qualifications provides a powerful motivation to learn).

Employees have access both to:
- vocational training;
- more broadly-based learning, through Employee Development Programmes and learning centres.

Management and Unions appreciate the transferable relationship between learning for life, and vocational performance.

Training for Union officers, representatives and volunteers in lifelong learning and guidance

Union officers and representatives involved in taking forward lifelong learning and guidance receive training appropriate to their role (e.g. awareness training, negotiating for learning and guidance, and the processes of assessment and accreditation).

Union representatives and volunteer employees involved in providing front-line guidance receive formal – and preferably accredited – training to develop their guidance skills and understanding of their role.

Enriching work and the community

Management and Unions jointly explore ways in which the company's developing lifelong learning culture can influence:
- job enrichment (e.g. through multi-skilling, increasing transferability, providing the stimulus for job-rotation and self-controlling work teams, and increasing the opportunities for progression);
- the wider local community (e.g. by opening up learning and guidance facilities to employees' families and/or members of the community more generally, by improving the ability of employees to provide learning support to their own children, and through the ability of employees to act as ambassadors of learning).

FURTHER INFORMATION

This briefing was informed by a number of case-studies and discussed at a TUC/NICEC Consultation held in November 1997. The case-studies are being published as:
Trade Unions and Guidance for Learning and Work: Some Case-Studies, available price £5.00 from the TUC, Congress House, Great Russell Street, London WC1B 3LS.

Further copies of this Briefing are available from:
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